

CLASS TITLE: TAXPAYER ASSISTANCE REPRESENTATIVE II (TAXATION)

Class Code: 02687100
Pay Grade: 20A
EO Code: E

CLASS DEFINITION:

GENERAL STATEMENT OF DUTIES: Within the Department of Revenue (DOR) Division of Taxation, to provide a wide range of assistance and authoritative information of varying complexity regarding state tax laws by telephone, in digital environments, and/or in person; to interview and communicate with taxpayers and their representatives to determine the nature of their tax problems and to advise as to the best solution to those problems; to research and attempt to resolve a wide variety of taxpayer problems including when other channels have been exhausted; and to do related work as required.

SUPERVISION RECEIVED: Works under the general supervision of a superior from whom assignments are received with some instructions; work is reviewed and evaluated at completion based on the results obtained and on conformance to the laws, regulations and procedures pertaining to the various taxes for which the Division is responsible.

SUPERVISION EXERCISED: To serve as a lead worker by assisting a supervisor in acclimating new employees to the job duties; to assist a supervisor in managing the completion of work in assigned queues and to perform other lead tasks as assigned. May provide instruction to new employees in training.

ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:

Within the Department of Revenue (DOR) Division of Taxation, to provide a wide range of assistance and authoritative information of varying complexity regarding state tax laws by telephone, in digital environments, and/or in person.

To interview and communicate with taxpayers and their representatives to determine the nature of their tax problems and to advise as to the best solution to those problems.

To research and attempt to resolve a wide variety of taxpayer problems including when other channels have been exhausted.

To clarify content of letters/notices received by taxpayers; to review, clarify and explain procedures and methods that may be causing the taxpayer difficulty.

To assist in areas of Rhode Island personal income tax including but not limited to refund status, resident status, non-resident and partial year resident filing requirements, estimated tax, servicemember's filing requirements, withholding tax requirements, property tax relief credit, and other tax credits.

To assist in areas of the Rhode Island business corporation taxes including but not limited to estimated filing requirements, due dates, and other areas of state taxation such as those involved with the sales and use tax.

To assist in areas of the Rhode Island excise taxes and other business-related taxes including but not limited to filing requirements, due dates, and other areas of state taxation.

To help taxpayers prepare/submit current, delinquent, or amended returns including all supporting attachments such as forms, statements, schedules, affidavits, and explanations.

To analyze copies of returns, schedules, and transcripts of accounts necessary to assist the taxpayer.

To advise taxpayers concerning their rights to file claims and to assist taxpayers in the effective preparation of payment plan arrangements, penalty waivers, and request for refunds.

To explain the requirements for and to assist taxpayers in preparing applications for extensions of time to file various tax returns.

To communicate methods of resolution with taxpayers and/or their representatives in a clear and effective manner.

To assist taxpayers in answering requests from tax officials for information, particularly when such requests for information or clarification aide in the resolution of erroneous returns.

When taxpayer service workload permits, to perform duties in such areas as collections or audits which are commensurate with the duties above.

To assist taxpayers in the enrollment and authorization processes for electronic funds transfers and electronic filing.

To assist taxpayers with questions related to business tax obligations and registration processes.

To utilize databases to locate missing payments submitted via ACH Credit, ACH debit and credit card.

To do related work as required.

REQUIRED QUALIFICATIONS FOR APPOINTMENT:

KNOWLEDGE, SKILLS AND CAPACITIES: Knowledge of and the ability to interpret and rapidly recall various state tax laws, regulations, practices and procedures; the ability to meet and communicate with taxpayers and their representatives, including in stressful situations involving adverse actions on the part of the Division; the ability to conduct mutually-informative interviews using standard interviewing techniques and human relations skills; the ability to collect necessary information by communicating with taxpayers and/or their representatives in various forums; the ability and judgement to ensure that the tax laws, regulations, and procedures are interpreted with consistency and equity for all taxpayers; the ability to assist taxpayers in the preparation and submission of current, delinquent, or amended tax returns including all supporting attachments; working knowledge of Windows Operating Systems, usage of a personal computer (PC) and standard desktop office tools; capacity to navigate a computer while on the telephone and while providing in-person assistance; the ability to provide clear and accurate information to taxpayers, representatives, and other interested parties; the ability to interact with taxpayers, the public and co-workers in a professional, tactful and courteous manner; the ability to initiate correspondence and make necessary corrections to taxpayer accounts; the ability to communicate clearly and effectively in both verbal and written communications; the ability to follow verbal and written instructions and to review and complete tax-related forms and applications; the ability to identify and recognize specific information from a mass of data; the ability to efficiently and effectively navigate an integrated automated taxation database; and related capacities and abilities.

EDUCATION AND EXPERIENCE:

Education: Graduation from a college of recognized standing with an Associate's degree in Business Administration, Accounting, Economics, Mathematics, Finance, Marketing, Management, or a closely related field; and

Experience: At least two (2) years of employment working with the public or the preparation and filing of tax returns and/or reports of individuals, partnerships, or corporations.

Or, any combination of education and experience that shall be substantially equivalent to the above education and experience.

Class Created: November 21, 2021